



Chapter 1606

Montgomery GI Bill - Selected Reserve Basic Program

NCC Paul Dowd, (Retired)

*Commander, Naval Reserve Forces Command
Director, Education and Incentive Programs*



MGIB-SR Basic References



- Title 10 U.S.C. Chapter 1606
- DoDINST 1322.17
- COMNAVRESFORINST 1780.1A



Eligibility Requirements



- Gained to the Selected Reserve
- Incur a 6 year drilling Reserve obligation on or after 1 July 1985
(Must be in a Drill Pay status)
- Must have a High school diploma, GED or equivalent prior to benefit application (law change Oct 02)
- Maintain satisfactory drill performance / participation
- Cost to member: \$0



Entitlements



- 36 Full-time benefit months
 - \$288 per month based on full-time pursuit (As of 1 October 2004)
- 14 years to use benefits from eligibility date
(changed from 10 years to 14 years effective 1 Oct 02)
- Member may also be eligible for Chapter 30 (ACDU MGIB), cannot use at the same time or for same course of instruction.
- Federal limit of 48 total months of entitlement



Program History



- Program established 1 July 1985
 - One BA degree
- Legislative change 1 October 1990
 - Dual BA degrees
 - Enhanced benefits (OJT, Correspondence Courses, Flight Training)
- Legislative change 30 November 1993
 - Graduate level courses



ANY QUESTIONS?



Chapter 1606

Montgomery GI Bill - Selected Reserve Kicker Program

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MGIB-SR Kicker References



- Chapter 1606, Title 10, U.S.C.
- DoD Instruction 1322.17
- ALNAVRESFOR 14/00 (Program Management)
- Semi-Annual Eligibility Policy message



Program Intentions



- Effective 1 April 2000
- Provide an additional educational assistance benefit to Reserve Component members who possess critical specialties.
- Designed as a Recruiting and Retention incentive to fill critical personnel needs in the drilling Reserve.



Kicker Incentive Eligibility

- Must be entitled to MGIB-SR Basic benefits
- Must incur a 6-year drilling Reserve obligation on or after 1 April 2000
- Be serving in a critical specialty as listed in the "Semi-Annual Enlisted Incentive Bonus and Montgomery GI Bill - Selected Reserve (MGIB-SR) Kicker Program Eligibility Policy" message.
- Cost to member: \$0



Kicker Incentive



- Will be paid in addition to the Basic MGIB-SR benefits. (Not an increase of the basic benefit)
- Will be paid at the rate of \$200 per month based on full-time pursuit.
- May also be paid in conjunction with educational assistance received under Chapter 30 of Title 38, U.S.C. (Active Duty MGIB).



ANY QUESTIONS?




Enlisted Incentive Programs

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Enlisted Incentives References

- 
- Chapter 5, Title 37, U.S.C., Sections 308c, 308e, 308i, and 308b.
 - DoD Instruction 1205.21
 - COMNAVRESFOR Instruction 1100.4B
 - Semi-Annual Eligibility Policy message

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Eligibility Listing For the period of 1 October 2004 - 30 March 2005

Rates/NEC's Eligible for Affiliation, Prior Service, Reenlistment/Extension Bonuses and MGIB-SR Kicker

P03			P02		P01
AC	ET	PR	AW	PR	CTM
AE	FC	QM	CTA	STS	CTO
AME	GM	RP	CTI		
AW	HT	STG	CTM		
BM	LN	STS	CTR		
CM	MA	TM	IS		
EA	MN	UT	LN		
EN	MR		MA		
EO	OS		MN		

NEC's

Must be assigned in a valid billet requiring the NEC (Can be cross-assigned)

2401	8211	8250	8251	8252	8262	8271	8278
8289	8404	8707					

Rates Eligible for Reenlistment/Extension Bonuses ONLY (Must already be in the Drilling Reserve)

P03		P02	P01
AD	CS	AC	ABF
AM	CTA	AG	CTA
AO	GSE	ET	CTI
AS	HM	TM	DT
AT	MM		IS

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Four Types of Incentive Bonuses



- NON-PRIOR SERVICE BONUS
- AFFILIATION BONUS
- PRIOR SERVICE ENLISTMENT BONUS
- REENLISTMENT/EXTENSION BONUS



BASIC ELIGIBILITY CRITERIA



Basic Incentive Eligibility

- Paygrades E-1 through E-3 for NPS Basic Enlistment Bonus.
- Paygrades E-4 through E-6 for Affiliation, Prior Service and Reenlistment Bonuses.
- Designated ratings or specialties (NEC's) as listed in the current Semi-Annual Enlisted Incentive Bonus Eligibility Policy message.
 - For NEC's, member must be assigned in a local billet requiring the NEC.
- Non-Prior Service APG members are ineligible.
(By law, they must complete a minimum of 84 days of training)



Basic Incentive Eligibility (Prior Service Temporary Paygrade Programs)

- From 1 January 2001 - 30 September 2002, temporary rating Prior Service programs were eligible for incentives.
 - PRIOR SERVICE APG
 - RESCORE-R
 - OSVET
 - NAVET
 - CB-VET
- Members that enlisted via these programs must make their rating permanent within the prescribed program timeframe.
- ALNAVRESFOR 031/02 cancelled this policy.



Basic Incentive Eligibility ***(Reduction in Rate - Voluntary/Involuntary)***

- A **voluntary** reduction in rate **MAY NOT** be used to establish eligibility for a **reenlistment** or **affiliation** incentive bonus.
- A **voluntary** reduction in rate **MAY** be used to establish eligibility for a **prior service** enlistment incentive bonus only in the following circumstance;
 - If there are no recruiting reservations for the members current rating, and the rating is closed for recruitment, a member may voluntarily agree to an administrative reduction in rate for the purpose of enlisting in the Naval Reserve, and may apply for incentive program eligibility at the lower paygrade. (I.E., AC2 is closed for recruitment and not incentive bonus eligible but AC3 is open for recruitment and is incentive bonus eligible).



Basic Incentive Eligibility ***(Reduction in Rate - Voluntary/Involuntary)***

- An **involuntary** reduction in rate (i.e., Reduced as a result of Captain's mast Non-Judicial Punishment (NJP)) cannot be used to apply for **ANY** incentive bonus eligibility.
- Members that are currently eligible for an incentive bonus and are **involuntarily** reduced in rate, will maintain eligibility, providing the member remains in the Drilling Reserve.



NON-PRIOR SERVICE (NPS) BASIC BONUS

ELIGIBILITY CRITERIA



Non-Prior Service Basic Program

- Program became effective in FY02 for “HM” and expanded to include “CB’s” beginning in FY03.
- Members are recruited by Active Duty recruiters
 - Attend “Boot Camp” and “A” school (IADT) and then affiliate with the Drilling Reserve for 6 years (time spent on IADT counts toward completion of the 6 year obligation)
 - They have three options:
 1. Elect to stay on Active Duty (contract changed), election may be made during or immediately after completion of IADT, or
 2. Affiliate with a Drilling Reserve Fleet Hospital unit / CB unit immediately upon completion of IADT, or
 3. Quit and go home and transfer to the IRR
- Not Entitled for Bonus until they affiliate
 - 6 year obligation date will be “Date shipped to Boot Camp”
 - Initial Payment will be made after Affiliation (completion of IADT) with an effective date of “Shipped to Boot Camp”



Non-Prior Service Basic Enlistment Bonus (Payment)

- Non-Prior Service Basic Enlistment bonus will be paid as follows:
 - Six-year contract:
 - Total bonus of \$5,000, less taxes.
 - Initial payment of \$2,500, less taxes,
 - Subsequent anniversary payments of \$416.66, less taxes
 - **NDAA 2005**
 - **Authorized increase to \$10,000**



AFFILIATION BONUS

ELIGIBILITY CRITERIA



Affiliation Incentive Bonus Eligibility

- Be serving on their initial Military Service Obligation (MSO).
(Less than 8 years from their PEBD)
- Have satisfactorily completed their term of obligated active duty service.
- Where released under honorable conditions, and have a Reserve obligation remaining under sect. 651 of 10 U.S.C.
- Have not previously received an affiliation bonus in the Drilling Reserve.



Affiliation Incentive Bonus Payment

- Members will receive an affiliation bonus as follows:
 - \$50 multiplied by the number of months remaining on their MSO at the time of affiliation.
 - If they have 18 whole months or less remaining on their initial MSO, they will receive lump sum.
 - If they have more than 18 whole months remaining on their initial MSO, they will receive one-half upon affiliation and one anniversary payment.

Examples:

Months Remaining on MSO = 10 x \$50 = \$500 Bonus (Lump Sum)

Months Remaining on MSO = 20 x \$50 = \$1,000 Bonus (\$500 init + \$500 Ann)



PRIOR SERVICE ENLISTMENT BONUS

ELIGIBILITY CRITERIA



Prior Service Bonus Enlistment Eligibility

- Enlist in the Drilling Reserve for a period of 3 or 6 years.
- Be serving in the same permanent rating that they successfully served in while on active duty.
- Have completed their MSO and have less than 14 years of total military service from their Pay Entry Base Date (PEBD).
 - ***NDAA 2005 Increased time period to less than 16 years***
- Where honorably discharged.



Prior Service Bonus Enlistment Payment

- Enlistment bonus will be paid as follows:
 - Six-year contract:
 - Total bonus of \$5,000, less taxes.
 - Initial payment of \$2,500, less taxes
 - And six anniversary payments of \$416.66, less taxes
 - Three-year contract (first):
 - Total bonus of \$2,500, less taxes.
 - Initial payment of \$1,250, less taxes
 - And three anniversary payments of \$416.66, less taxes
 - **NDAA 2005**
 - ***Authorized increase to \$15,000 and \$7,500 respectively***



REENLISTMENT / EXTENSION BONUS

ELIGIBILITY CRITERIA



Reenlistment/Extension Bonus Eligibility

- Reenlist for 3 or 6 years or voluntarily extend for 3 years in the Drilling Reserve.
- Have less than 14 years of total military service from their Pay Entry Base Date (PEBD) upon execution of their reenlistment or extension contract.
 - ***NDAA 2005 Increased time period to less than 16 years***
- Be a member of a Drilling Reserve unit prior to execution of their reenlistment or extension contract.
- Be within 12 months of their Expiration of Service (EOS).
(If reenlisting to become eligible).



Reenlistment/Extension Bonus Payment

- Reenlistment bonus will be paid as follows:
 - Six-year contract:
 - Total bonus of \$5,000, less taxes.
 - Initial payment of \$2,500, less taxes
 - And six anniversary payments of \$416.66, less taxes
 - Three-year contract (first):
 - Total bonus of \$2,500, less taxes.
 - Initial payment of \$1,250, less taxes
 - And three anniversary payments of \$416.66, less taxes
 - **NDA 2005**
 - **Authorized increase to \$15,000 and \$7,500 respectively**



ADMINISTRATION



Enlisted Incentive Program

“Written Agreements”

- All eligible members are **required** to read and sign a specific incentive bonus “Written Agreement”.
 - NAVRES Incentive Agreement 1-1 (Affiliation)
 - NAVRES Incentive Agreement 1-2 (Prior Service)
 - NAVRES Incentive Agreement 1-3 (Reenlistment/Extension)
 - NAVRES Incentive Agreement 1-4 (Non-Prior Service Basic)
- **Naval Reserve Activities** are responsible for completing the “Written Agreements”.



NDAA 2005 Changes



NDAA 2005 Authorization Implementation Enlisted Incentives 3 Tier Bonus Plan

- **Structured similar to Active Duty SRB Plan**

- \$\$ Max Ceiling limits based on Category
- \$\$ Award Levels based on manning levels

- **ECM Management**

- Facilitate better community management, offering more \$\$ to members that will fill or who are filling the most critical demand signals both in the recruiting and retention arena.

PLAN

- **Prior Service and Reenlistment Bonuses**

- Tier 1 - Most Critical (Example: 8404, NCW, NAVELSF, Rates manned <70%)
- Tier 2 - Critical (Example: AIRCREW, CB's, Rates manned >70% and <80%)
- Tier 3 - Least Critical (Example: Rates manned >80% and <90%)
 - 6 year contract
 - Tier 1 = \$15,000 (\$7,500 initial and 5 payments of \$1,500)
 - Tier 2 = \$10,000 (\$5,000 initial and 5 payments of \$1,000)
 - Tier 3 = \$ 7,500 (\$3,750 initial and 5 payments of \$750)
 - First 3 year contract
 - Tier 1 = \$ 7,500 (\$3,750 initial and 2 payments of \$1,875)
 - Tier 2 = \$ 5,000 (\$2,500 initial and 2 payments of \$1,250)
 - Tier 3 = \$ 3,000 (\$1,500 initial and 2 payments of \$750)
 - Second 3 year contract
 - Tier 1 = \$ 6,000 (\$3,000 initial and 2 payments of \$1,500)
 - Tier 2 = \$ 4,000 (\$2,000 initial and 2 payments of \$1,000)
 - Tier 3 = \$ 2,000 (\$1,000 initial and 2 payments of \$500)



NDAA 2005 Authorization Implementation Enlisted Incentives 3 Tier Bonus Plan

- **Non-Prior Service Basic**

- 6 year contract
 - \$10,000 (\$5,000 initial (upon affiliation) and 5 payments of \$1,000)

- **Rate Conversion Bonus**

- No contractual period (must complete requirements of rate change)
 - \$2,000 (Lump Sum (upon change approval))

- **Systemic Challenge**

- **Reserve Headquarters System (RHS)**
 - Development in progress
- **RIMS(FM) and DJMS-RC**
 - DoD already working with DFAS on systemic changes to accept new bonus authorizations

- **Proposed Implementation date - 1 April 2005**



ANY QUESTIONS?